

## **Headquarters**

Program/Course Manager  
Guide to Class 'C' Training



## **TQCINST M1500.1C**

03 October 2005

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United States  
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## TRAINING QUOTA MANAGEMENT CENTER INSTRUCTION M1500.1C

Subj: Headquarters Program/Course Manager Guide To Class 'C' Training

Ref: (a) Training and Education Manual, COMDTINST M1500.10(series)  
(b) Cutter Training & Qualification Manual, COMDTINST M3502.4(series)  
(c) Class 'C' School Funding Process, COMDTINST 7302.2(series)  
(d) Financial Resource Management Manual, COMDTINST M7100.3(series)  
(e) Joint Federal Travel Regulations (JFTR) NAVSO P-6034

1. PURPOSE: This instruction establishes policy and guidance for Headquarters Program, Course Managers and TQC schedulers to follow for the standard execution of Headquarters funded class 'C' training. It is intended for those personnel involved in the class 'C' training process.
2. ACTION: All Headquarters Program and Course managers and TQC schedulers shall ensure compliance with this instruction.
3. DIRECTIVES AFFECTED: TQCINST 1500.1B is hereby cancelled.
4. DISCUSSION: This guidebook provides an overview of the Coast Guard Class 'C' school training program including the duties and responsibilities of the Training Quota Management Center (TQC) and Headquarters program and course managers.

A handwritten signature in black ink, appearing to read "R. E. Purington".

R. E. PURINGTON

Encl: (1) Headquarters Program/Course Manager Guide To Class 'C' Training

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## **I. TRAINING SYSTEM DEFINITIONS**

### **PURPOSE:**

The purpose of this chapter is to establish standard definitions of the administration of Coast Guard Class 'C' Training.

### **ACTUAL EXPENSE ALLOWANCE (AEA)**

Normally, per diem rates are adequate for a particular training assignment. When allowable per diem rates are insufficient because of special duties, or because costs for items have escalated temporarily due to special or unforeseen events, Actual Expense Allowance (AEA) may be authorized as prescribed in U4200 of the JFTR (ref e). AEA is used on a case-by-case basis, and only after consideration is given to the facts existing in each case.

The following are some examples that may warrant authorization of AEA:

- Member travels with a dignitary and is required to stay at the same hotel.
- Due to special events such as missile launching, international/ national sporting events, world fairs, conventions, or natural disasters, per diem rates have exceeded the maximum allowed for that area.
- Affordable lodging is not available or can't be obtained within a reasonable commuting distance of the members training site; and transportation costs to commute to and from the training site will consume most of the savings achieved by occupying the less expensive lodging.

The daily maximum for AEA is 150 percent of the per diem rate for that area, or \$50 plus the per diem rate prescribed in the JFTR. When situations arise that warrant AEA, individuals must furnish accurate and complete details of the expenses. AEA may be approved prior to, during, or after travel has been performed. The Commanding Officer of TQC, as the order issuing authority, approves or disapproves all requests for AEA.

### **AFC-30**

Normal and ordinary operational and maintenance costs, other than military and salaried civilian personnel costs. Services, i.e. rental of classroom spaces, printing of training publications and/or manuals or production of training films, videos, etc. are also AFC-30 charges. See ref (d).

**AFC-56**

Funding for travel and per diem to and from formal training performed as TDY for Coast Guard Active duty, Civilian and Auxiliary personnel, and for CG Reserves under extended active duty contracts. Also includes direct training costs for tuition. The centralized AFC-56 account is the primary source of funding for pre-arrival training and required training as outlined in reference (b). AFC-56 also funds Recruit training, 'A' Schools, 'C' Schools, Advanced Education (PG school), Tuition Assistance and Headquarters field unit training. This account is managed by CG-132. See ref(d)

**AFC-90**

Used to cover all necessary expenses for the Coast Guard Reserve including funding for travel and per diem for class 'C' training. This is managed by CG-13R. See ref (d).

**DIRECT ACCESS**

The service wide system used to manage many facets of Active Duty/Reserve personnel administration. It has a module, called Training Administration System (TAS), which is used to schedule 'A' and 'C' schools, issue travel orders, and document training. Program managers are required to have adequate Direct Access user role (CGTASMGR) to enroll students in "SLATE" type courses and monitor student/quota usage.

**CLASS 'C' QUOTA/FUNDS PRIORITIZATION PANEL**

A panel of HQ program managers responsible for evaluating and reviewing the AFC-56 Training Spend Plans from each program to determine quota needs, confirm training categories and set priorities. The panel then establishes the final funding line after re-examining courses and provides funding information to Program/Course Managers in the form of the Class 'C' School Master Training Spend Plan (MSP). The panel is chaired by CG-1323. Reference (c) contains the policies and procedures for this activity.

**CLASS 'C' TRAINING**

Short-term training (less than 20 weeks) designed to provide advanced/specialized skills and knowledge to perform a task, or group of tasks, required by a specific billet.

**CLOSE OUT**

Period during the end of the fiscal year, normally the first week of August, where TQC issues orders for all remaining class 'C' schools for the current fiscal year to allow CG-1012 to capture un-obligated AFC-56 class 'C' funds for redistribution.

**COURSE**

A validated course of instruction offered by Coast Guard, DoD, other Federal Agency, or commercial contract. Each 'C' school course funded by AFC-56 has its own distinct course ID number. A course may have as few as one session or several sessions throughout the year.

**COURSE CODE**

Numeric group identifying a specific course. This is the primary means of tracking course/session work within Direct Access. It is also used to document training in a member's individual training record. Also known as Financial Procurement Desktop (FPD) project code. (May be called PMIS code).

**COURSE MANAGER**

The individual at CG Headquarters responsible for all aspects of a particular Class 'C' training course of instruction. The course manager works with CG-132 to update, revise, or validate existing or planned curricula. The course manager provides input to the training program manager for annual quota requirements. For slate courses, the Course Manager is responsible for selecting students and enrolling them into Direct Access. The course manager is also responsible for granting waivers when required. Depending on the size of the program, a course manager may have more than one course and in the case of a small program, the Program Manager and the Course Manager may be the same person. (See also Program Manager, Program Single POC).

**COURSE WAIT LIST**

A Direct Access process that designates a student for a particular course but does not assign the student to particular session. The next step would be to place the student in a session wait status, which places the student into a particular session. (See also Enrolled, Session Wait).

**ENROLLED**

The Direct Access process of choosing who attends a particular session. It is the step immediately prior to issuing orders. If a student is enrolled, it is intended that member will attend the session. (See also Course Wait, Session Wait)

**ETR**

Electronic Training Request. The Direct Access process by which unit training coordinators can enter a request for a course and a particular session electronically. The use of the ETR obviates the need for a paper Short Term Training Request (CG-5223).

**FRONT END ANALYSIS (FEA)**

The systematic study of an existing or potential performance problem, incorporating data and opinions from varied sources, in order to make effective decisions or recommendations about training and non-training solutions.

**JOB TASK ANALYSIS (JTA)**

The process in which a job is divided into functional areas. These functional areas are then reduced to a set of behaviors that comprise tasks that produce accomplishments of value to the organization. Job-related training requirements are determined by evaluating associated tasks in terms of importance, difficulty, and frequency.

**MASTER TRAINING SPEND PLAN (MSP) DATABASE (db)**

The MSP reflects the training needs for each program within the Coast Guard. It is a compilation of individual class 'C' school Training Spend Plans for all Headquarters programs, indicating funded class 'C' schools. CG-1323 is responsible for consolidating individual program Training Spend Plans into the MSP and the class 'C' quota/funds prioritization panel is responsible for evaluating and reviewing the MSP.

**NO-COST ORDERS**

Orders issued with no associated travel or per diem costs. TQC normally issues no cost orders when a member is assigned to class 'C' training within their Permanent Duty Station (PDS), or to reserve a seat for Reserve, International, or non-CG personnel, or for on-line training at the PDS.

**PERMANENT DUTY STATION (PDS)**

The post of duty or official station, including a ship, to which a member is assigned or attached for duty.

**PRIVATELY OWNED CONVEYANCE (POC)**

Unless otherwise qualified, any mode of transportation actually used for the movement of persons from place to place other than a government conveyance or common carrier.

**POC – ADVANTAGEOUS**

When travel by member(s) via POC is more efficient and economical for the government, if there is no commercial transportation available, or when a common carrier would be so time consuming that it would delay the mission. Member will receive reimbursement for all associated travel. Note: ONLY ONE ROUND TRIP WILL BE REIMBURSED WHEN QUARTERS ARE DIRECTED.



**POC – CONVENIENCE**

POC may be authorized for the member's convenience. In this case, member will be reimbursed only up to the cost to the government for sending the person to school via common carrier, or up to the cost of a government transportation request (GTR). Member will also be required to take leave for any excess travel time.

**PROCUREMENT REQUEST (PR)**

Generated in FPD by PM's to procure commercially provided training or any tuition cost. Sent to CG-1012 for processing.

**PROGRAM MANAGER (PM)**

The "PM" is responsible for all aspects of class 'C' training within a program, including: performance review to determine if training gaps exist; working with CG-132 to schedule FEA's; reviewing course curricula every 3 years, reviewing program training needs annually, and requesting quotas in accordance with reference (c). In most cases, TQC's primary POC within the program. Depending on the program, the program manager and course manager responsibilities may be handled by the same person. (See also Course Manager)

**PROGRAM SINGLE POC**

The person designated as the directorate's representative with CG-1323. Responsible for all arrangements regarding funding of courses, quota offsets, and ensuring that resources are available in order to conduct class 'C' training. This person also represents the program at the Class 'C' Quota/Funds Prioritization Panel. In some cases, this person can also be a program or course manager, depending on the size and amount of class 'C' training within the program.

If the program authorizes a rental vehicle, no more than 1 rental vehicle per four students will be authorized in the travel orders. The exception is students who are on the economy, using commercial berthing and messing. In this case a rental car is issued to each student.

**SESSION**

A distinct meeting of a particular course. Students are enrolled by session and Direct Access orders are developed around particular sessions.

**SESSION WAIT**

The process of placing candidate students into a particular session on a waiting list in Direct Access. After prioritization of competing students and needs, a student who is session waited will be enrolled in a session. (See also Course Wait, Enrolled)

**SF-182**

Form used to procure a course with an associated tuition cost. The SF-182 is a funding document generated by CG-1012 for courses with approved tuition in the MSP.

**SHORT TERM RESIDENT TRAINING REQUEST (CG-5223)**

Form submitted by students to PM's to request attendance at commercially provided 'C' schools and non-resident training. It is also used to request all 'C' schools when a unit does not have connectivity.

**SLATE**

Form used by TQC to process orders for those courses where the HQ program/course manager selects the student(s) for training. It contains information regarding course logistics, course costs, course attendees, and special information needed by the attendees and schedulers. It must be completed properly to ensure timely processing and issuing of TDY orders by TQC. See Chapter VI and enclosure (3).

**TDY**

Temporary Additional Duty - Used to direct a member or members to go from their permanent duty station to another location to perform temporary duty at the location, and to return to their permanent duty station upon completion.

**TONO**

Travel Order Number. The accounting information required to execute orders to school and to file a travel claim.

**TQC**

Training Quota Management Center, Chesapeake VA. See chapter IV.

**TRAINING ADMINISTRATION SYSTEM**

The primary application used by TQC to schedule personnel for training, enter entitlements, issue travel order numbers, and document training completion.

## **II. CLASS 'C' TRAINING OVERVIEW**

### **PURPOSE**

This chapter provides program and course managers a broad overview of the AFC-56 budget cycle, the class 'C' quota allocation process and the scheduling process as it relates to Class 'C' training.

### **AFC-56 CHARGEABLE EXPENSES**

Travel and Per Diem for active duty Coast Guard members, Coast Guard Civilian employees, and members of the Coast Guard Auxiliary. (Coast Guard reserve members on extended active duty contract should contact their FOT for current policy on AFC-56 funded vice AFC-90 funded travel and entitlements.) See ref (d).

Instructor travel and per diem for exportable training.

Tuition and course material for commercially contracted courses

### **AFC-56 NON-CHARGEABLE EXPENSES**

DOD personnel; international students; other Government agency personnel and contracted civilians.

Printing of training publications and manuals, and production of training films, videos, etc.

Training aids, services (i.e. rental of classroom), supplies and equipment.

Travel and per diem for formal training of more than 20 weeks or 140 days' duration. This is normally funded with AFC-20 (PCS money). See ref (d).

### **COST VS. NO COST TONO'S**

In those cases where the student is traveling to training within the normal PDS area, a no cost TONO is normally utilized. If an additional cost to the member will be accrued, such as for bridge tolls or parking, students should file a local travel claim to seek reimbursement. If the TDY for the training is such that the student will travel outside of the normal PDS for training, a TONO will be provided.

In the case where the travel is within a reasonable commuting distance but outside the PDS, the TONO shall pay for one round trip of travel plus the lodging and per diem costs. If the student should choose to commute from home or the local unit during the training, the

student will bear the additional cost of travel. If it is deemed to be more cost effective for the member to return home during each night of the training, the student shall either pay for the excess travel or seek reimbursement through a local travel claim filed with the local command. The intent of this policy is to provide the most conducive training environment for the most effective cost. It is in no one's best interest to have a student who is spending two or more hours on the road commuting back and forth to training. Where special circumstances exist, TQC will make the determination on a case-by-case basis. Requests shall only be considered when submitted by message traffic, or via email from the unit CO/XO, or program manager.

## **CLASS 'C' ANNUAL BUDGET CYCLE**

The following step-action table reviews the annual schedule build and the quota allocation/prioritization process, and how they relate to the annual budget cycle.

January:	CG-1323 issues preliminary budget targets for training to programs and solicits next year's training plan requests.
January:	Given constraints of a budget target, programs define quotas in particular courses needed for the next fiscal year for NON-DOD provided training. DOD quota requirements are defined for the next 5 fiscal years. Quota requirements are entered in MSP.
February:	Program input is entered in the MSP and reviewed for consistency with historical cost per quota information.
February:	CG-1323 forwards approved training requirements as follows: <ul style="list-style-type: none"><li>• Coast Guard resident training to the resident training centers, which factor in instructor time, classroom space and berthing in scheduling the appropriate number of sessions and dates</li><li>• commercially contracted non-resident training requirements to Program Managers to coordinate procurement actions with CG-1012 and set up sessions through TQC</li><li>• DoD requirements to TQC to coordinate 5 years of requirements.</li></ul>
March -April:	Resident training centers forward scheduling information to CG-1323 and TQC. TQC reviews training center input, enters in Direct Access, and posts the updated annual course/session convening schedule on TQC's website for immediate scheduling
August:	Closeout begins first week of August. TQC issues TONOs for all remaining class 'C' schools in the current fiscal year. (Those Programs who manage SLATE courses and have any class convenings in September must have slates for those courses to TQC by the last

week in July to allow TQC schedulers time to issue orders). Close-out allows CG-1323 to capture un-obligated AFC-56 class 'C' funds for redistribution. Initiate PR's to CG-1012 for commercially provided training.

Mid-August: TQC begins to issue orders for next fiscal year session convening schedule.

October-November: Final budget allocation is received. If necessary, CG-1323 convenes class 'C' quota/funds prioritization panel with program single POCs to collectively consider quota requests and make any needed adjustments to Class 'C' School Master Training Spend Plan.

Note: During the execution of the Class 'C' School Master Training Spend Plan, CG-1323 and TQC work with programs on a daily basis to accommodate quota/course changes and funding requirements.

### **Class 'C' School Training Funds/Quota Allocation Process**

'C' school funds are managed by CG-1323 and provided from the AFC-56 budget allotment. Other training and education funded by AFC-56 include Recruit training, 'A' Schools, Advanced Education (PG school), Tuition Assistance and Headquarters field unit training.

'C' school funds are distributed to programs in the form of quotas using a cross-programmatic prioritization process. This process involves single POCs from each program collectively considering quota requests on the MSP at the class 'C' quota/funds prioritization panel held at the beginning of the fiscal year. Meetings are held quarterly during the fiscal year to adjust the MSP for emergent situations and to best utilize available funds. This process provides a single list of prioritized quotas to CG-1323 and ensures dollars are allocated based on needs-driven priorities. CG-1321 Training Consultants will assist programs (Program Managers) in establishing/clarifying criteria to determine training needs and a process for determining number of quotas to be brought into the prioritization process.

The program designated single point of contact is responsible for ensuring that quotas are distributed within the program in accordance with the MSP.

### **III. TRAINING AND PERFORMANCE CONSULTING (CG-132)**

#### **PURPOSE**

This chapter provides an overview of the Office of Training and Performance Consulting.

#### **PERFORMANCE TECHNOLOGY TEAM (CG-1321)**

The Performance Technology Team focuses on the broad areas of performance analysis, consulting, and technology. This team performs all program, force and acquisition manager performance analysis and consulting functions. CG-1321 manages the Coast Guard wide Request for Analysis process and the Training and Education Advisory Council. The team is the primary champion of Human Performance Technology (HPT). The job titles of the staff include Performance Consultants, Acquisition Consultants, Performance Technologists, and the Instructional Technology Advanced Education Program Manager.

CG-1321 is specifically responsible for managing all Coast Guard human performance analysis projects; which are typically generated when a Program (Manager) requests training, or a significant change to existing training based on an observed performance problem or new performance requirement (i.e., new acquisition).

An initial analysis, using HPT methodologies, is conducted to determine whether training is needed, or another type of solution, like a clarification of a policy or development of job aids.

HPT refers to a group of methods, processes, and approaches used to improve human performance by solving or avoiding problems, and taking advantage of new technologies, methods and other opportunities.

HPT methodologies help the Coast Guard to focus on what the performance problem really is, what influences are impacting performance, and what has to be changed in the "system" to improve productivity and efficiency. An HPT approach:

- supports an "analysis first" approach
- asks those analyzing Coast Guard performance problems to examine **all** organizational influences on performers
- Provides analysts with tools and processes for identifying a solution set that closes all gaps affecting human performance
- helps the Coast Guard figure out the "right" performance supports for the best cost

**TRAINING AND EDUCATION TEAM (CG-1322)**

The Training and Education Team manages the training, learning, education, and assessment functions. This team is responsible for all training and education management, including lifelong learning, 'A' and 'C' School outcomes, training system integrity, system audits, and training evaluation. This team is also responsible for managing the Coast Guard College and Development Program, Advanced Education, Tuition Assistance, Enlisted Performance Qualification program, Instructional Systems Design expertise and instructor development, and testing and assessment. CG-1322 is the primary champion of Instructional Systems Design (ISD). The job titles of the staff include Training System Analysts, Instructional Systems Specialists, Program Analysts, and the Enlisted Performance Qualifications Manager. This team is also responsible for developing and managing the architecture to support new performance and training technologies, such as e-learning, web-based training, and electronic performance support systems.

**TRAINING RESOURCE MANAGEMENT TEAM (CG-1323)**

The Resource Management Team manages the resource and facilities management functions of CG-13 owned training centers and the CG Academy, 'A' and 'C' School quota management, AFC-56 spend plan development and oversight, and budgeting responsibilities of CG-132. CG-1323 is responsible for the management and assessment of all training system resources, including TRACEN budget model development and execution, CG-13 intra-office AFC-30 budget development and execution, AFC-56 budget development and oversight, quota management, TRACEN staffing standards, TAB management, and training system measurement program. The job titles of the staff include Resource Managers, Program Analysts, Budget Analysts, and the Training Quota Manager.

**CG-1323 is responsible for the following functions:**

- Allocates and executes the annual training budget (AFC-56) for all Coast Guard training including Recruit training, 'A' and 'C' Schools, Post Graduate School, Tuition Assistance, and field unit AFC-56 training.
- Allocates the centralized AFC-56 funds and management of class 'C' training quotas.
- Prepares AFC-56 budget requests.
- Approves program Training Spend Plans. Enters the Master Training Spend Plan into Direct Access, including quotas and estimated costs. Manages training plans/changes for each program throughout the fiscal year.
- Holds class 'C' prioritization meetings as needed with program single POCs to adjust quota totals.
- Provides AFC-56 related reports to all programs.

**TRAINING MANAGEMENT DEVISION (CG-1322)**

The Training Management Division manages the training, learning, education and assessment functions of the Coast Guard's formal training system. This Division is responsible for all training and education management, including: lifelong learning, "A" and "C" school outcomes, training system integrity, system audits and training evaluation. In addition, the Division is responsible for managing the Coast Guard College and Development Program, Advanced Education, Tuition Assistance, Enlisted Performance Qualification Program, Foreign Language Training, and Instructional Systems (ISD) activities and processes. Applying HPT and ISD to Program initiatives, enables the most efficient and effective performance support to execute Maritime Homeland Security missions.

The Division partner with Programs (Managers) to:

- Scope Projects;
- Review and execute performance analysis findings;
- Monitor and evaluate training;
- Develop & Implement HPT solutions.

Key Customers:

- Program Manager
- Rating Force Master Chiefs
- Training Centers
- Coast Guard Institute
- DOD
- Education Services Officers

Duties and responsibilities included yet are not limited to:

- Recommend changes to policy/procedures impacting the training system.
- Review course curricula regularly and identify shortcomings and deficiencies.
- Review course curricula for consistency with analysis results, program requirements, and compliance with training system policies & SOPs.
- Guide programs (Manager) in the development of task & performance requirements.
- Oversees the rating occupational analysis.
- Develop and promulgate enlisted performance qualifications
- Manage foreign language policy and training
- Facilitated the Armed Services Vocational Aptitude Battery examination process
- Manage MAXHR training for civilian employees

**BUDGET EXECUTION (CG-1012)**

Reconciles AFC-56 account and provides account status to CG-1323

Executes all funding documents for tuition approved in the MSP

Forwards Memorandum's Of Understanding (MOU) from PM's to G-ACS or HSC (a-3) for vendor courses as needed.

Forwards request for MIPRs for funding to DoD or other Federal Agencies.

Execute all funding documents for AFC-56 funds including approved courses listed on MSP.



## **IV. TRAINING QUOTA MANAGEMENT CENTER (TQC) OVERVIEW**

### **PURPOSE**

This chapter provides an overview of the missions and responsibilities of the Training Quota Management Center. TQC is a Headquarters unit located in Chesapeake, VA. TQC works for the Director of Reserve and Training (CG-13) and reports directly to the AFC-56 program manager (CG-1323).

### **VISION**

Centralized training quota managers, enhancing Team Coast Guard's performance through innovative training opportunities now and in the future.

### **MISSION**

The Mission of the Training Quota Management Center (TQC) is to schedule, facilitate and issue orders to Team Coast Guard personnel for Class 'C' training, including, mandatory pre-arrival training and formal school requirements as outlined by Headquarters Program Training Spend Plans or prescribed by Commandant Instructions. In support of this mission, TQC performs the following duties:

### **DUTIES**

Formulate mandatory pre-arrival schedules for individuals as they are assigned to all Coast Guard cutters 65 feet or greater, Loran Stations, MSSTs, PSUs, and other units requiring pre-arrival training. Coordinate as necessary with the Coast Guard Personnel Command and cognizant programs by issuing orders as appropriate to personnel requiring mandatory pre-arrival training.

Coordinate with assignment officers when they issue PCS orders for Class 'C' school training.

Issue TDY orders to class 'C' training to ship and shore personnel under the guidelines provided by Commandant (CG-1323) and headquarters programs. This includes Active duty, Civilian employees, Auxiliary personnel, PHS Doctors, Chaplains, and DOD members in CG liaison positions.

Issue no cost orders to Reserve personnel, DOD members, international students and members of other government agencies. Issue cost orders to Reserve personnel on Title 10 recall.

Maintain the coordination with DOD for training requirements that are part of the MSP.

Maintain DOD computer training quota management systems as required. Currently using USAF OTA (on line), Army Training Requirements and Resources System (ATRRS-on line), Navy Integrated Training Resources Administration Systems (NITRAS).

Provide assistance with Direct Access database queries for program managers.

Provide concurrent clearance review of all documents under draft, which affect the class 'C' training program, including but not limited to the following.

1. Cutter Training and Qualification Manual, COMDTINST M3502.4(Series).
2. Training and Education Manual, COMDTINST, 1500.10(Series).
3. Class Convening Schedule for Coast Guard Class 'A' and 'C' School Resident and Exportable Training Courses.

### **TQC/CG-1323 INTERFACE**

TQC plays a critical role in monitoring the execution of the service wide Class 'C' portions of the AFC-56 account and ensuring that the system is both responsive to customer needs and solvent.

Programs must begin planning the training budget in January-February preceding the beginning of the fiscal year. They receive an approximate target from CG-1323 at that time along with historical cost per quota information for all of their courses. Training requirements are sent to the training centers to schedule classrooms, barracks and instructors for the next fiscal year. Training centers develop a draft course schedule which in final format (after concurrent clearance and training manager reviews) is entered in Direct Access and posted on TQC's website. For scheduling Coast Guard Class 'A' and 'C' Resident and Exportable Training Courses.

Since the training schedule is formulated well in advance of the beginning of the fiscal year, information on DOD course/quota availability and final expenditure data is subject to change and necessitates changes in training spend plans just prior to and during the actual training year. TQC plays a pivotal role in monitoring these changes and advising the programs as appropriate.

As the training year proceeds, daily contact between TQC and the AFC-56 program manager provides programs the option of changing their training spend plans by transferring in additional (other AFC) funding, or offering "offsets" (unused, low cost or no cost quotas) from their AFC-56 training spend plan to fund new requirements. Changes are now frequently made the same day (identified as needed by TQC and executed by the AFC-56 program manager).

Before the beginning of the fiscal year, the AFC-56 program manager loads the approved Spend Plan courses and quotas into Direct Access (TAS) so that orders and TONOs can be issued at approximately 6-8 weeks before Oct 1<sup>st</sup>. TQC staff runs the Direct Access (PE) Program Element report on a monthly basis to check quota usage against the approved number of quotas entered from the spend plan. Shortages of quotas are brought to the attention of the courses' program manager so that they can work with the AFC-56 Funds Manager to make up any short falls.

## **V. TRAINING ADMINISTRATION SYSTEM DATABASE OVERVIEW**

### **PURPOSE**

To provide background information on the Training Administration System (TAS) a module in Direct Access, used by TQC to process and issue class 'C' training orders.

### **SYSTEM DESCRIPTION**

The primary tool that TQC and course managers use for quota request and assignment and issuing orders is a software program called the Training Administration System (TAS). CG-102 provides system manager and software support functions. TAS is a module of Direct Access, and is used to issue all Class 'A' and 'C' school orders. Completing sessions in TAS records course completion for each individual and forms the official training record.

### **SCHEDULING 'C' SCHOOLS**

TAS allows scheduling of personnel for training, issuing of travel order numbers, generating pre-printed TDY orders and a record of estimated financial obligations. TAS is capable of listing individual training records or generating reports of all individuals assigned to a particular unit by Department Identification Number, or Department ID.

### **ISSUING TONO'S**

TAS generates travel order numbers (TONOS) for training and obligates funds based on a specific member's location and the geographical location of the training. It can be modified to reflect appropriate entitlements members are authorized, including: airfare, quarters/messing availability, rental vehicle, local travel, etc.

### **SYSTEM LIMITATIONS**

One drawback to TAS is that the obligated amounts are only estimated. The FPD interface with TAS enables the funds manager in CG-1012 to enter obligations into the official Coast Guard accounting system. Expenditures are tracked in Core Accounting System (CAS) and then reconciled with the FPD information throughout the fiscal year. TAS is periodically updated to reflect adjusted travel and per diem costs.

### **CONFIGURATION MANAGERS**

CG-1323 and CO, TQC serve as the configuration managers for TAS, defining needed changes and consolidating user input for the system manager.

### **COURSE TITLES**

Course Titles are assigned by the program and entered into TAS by CG-1323, after approval of a validated training requirement.

## **COURSE TITLE CHANGES**

Course titles can be changed to better reflect course content. If a curriculum is modified to the extent that the course is “new,” a new course number must be assigned. CG-1323 will authorize and can change the course title to prevent confusion.

## **COURSE CODES**

Course ID numbers are assigned and entered into TAS by CG-1323. When a new course is entered into TAS, a course code is automatically generated for that course. The course code is the **PRIMARY** identification code in TAS. Training center course nomenclature is a secondary identifier in TAS. Whenever possible DOD/training source course numbers and titles and CDP’s (USN school keys) should be used as the name of the course and the secondary ID. This ensures that the student attends the right course, especially when hosted by another service. Course numbers are generally entered as listed below:

USN courses: use USN numbers, i.e., A-102-0000, etc.

USAF courses: use USAF numbers, i.e. L30ZR493-001 etc.

USA courses: use USA numbers, i.e. AFIS-COPAC, etc.

Commercial courses: use vendor number, i.e. GSA-220.

CG courses: CG courses are named using several naming conventions. New courses will follow the existing standards at each Training Center.

## **COURSE CODE NAMING CONVENTION**

Course ID numbers are a permanent record. Because of naming conventions used prior to COMDT reorganization, CG-1323 may require new courses to use the same course ID convention. With over 6000 courses in TAS, “grouping” of program courses is critical. Example: G-KSE-001(series) courses were created prior to HQ reorganization that changed the “KSE” office code to “WKS.” Because the courses followed this course ID convention, all “new” WKS courses will use the ID of “KSE” for continuity and archive purposes. This enables TAS to provide a prompt to the scheduler if the member has previously attended the course. If a curriculum is modified to the extent that graduates of the “old” course are NOT considered trained in the “new” curriculum, a new course ID and title shall be created. This will allow “old” members to receive training in the “new” course when needed. Once a course number is assigned by TQC it remains in the system for historical records/financial purposes and cannot be deleted. Hence, an “old course” may be reflected in TAS that is no longer used.

**CHANGES TO COURSE CODES**

Anytime a training source changes a course ID number, TQC will coordinate with the program and CG-1323 to determine the best method of incorporating the change into TAS.

**TAS COURSE DELETIONS**

When programs report that a course is no longer used, CG-1323 or TQC will inactivate the current course from the fiscal year Program Element in TAS, and removed from MSP.

Courses no longer utilized remain in TAS for historical purposes even though the course may not be funded in a particular year.

## **VI. PROGRAM/COURSE MANAGER RESPONSIBILITIES**

### **PURPOSE**

This chapter defines the duties and responsibilities of HQ program and course managers. Further direction and responsibilities are listed in reference (c).

### **DISCUSSION**

Program and course managers have overall responsibility for the execution of all Class 'C' courses under their control. Program and course managers must work closely with CG-132, TQC, rating managers and field units to determine Coast Guard wide training needs. There are two general quota management categories that program managers and course managers must be aware of; SLATE and NON-SLATE as discussed below.

### **SLATE VS. NON-SLATE COURSES**

**SLATE:** Those courses in which the program/course manager selects students. Program managers receive training requests from field units, select students for course sessions, enroll attendees into Direct Access and notify TQC. Note: TQC will only take slates entered into Direct Access by the Program Managers. TQC then determines/verifies TDY entitlements based on training location and CG-132 policy and issues TDY orders to the students. Students receive their orders via the airport panel in Direct Access. The programs remain responsible to authorize all changes (substitutions/cancellations/ waivers) to the "slate" of students. TQC will amend/cancel orders as directed. The slate form (enclosure 3) is used to provide the TQC scheduler all the logistical information required to issue appropriate orders (this is used almost entirely for commercial courses held outside the Coast Guard or DoD training systems).

**NON-SLATE:** Courses where TQC controls and centrally manages the quotas, typically the case for cutter related master training list mandated courses, Law Enforcement, Health and Safety and some Boat Forces courses. Programs have provided guidance on target audience and cancellations/ substitution policies. TQC receives all training requests from field units, selects students, determines/verifies TDY entitlements and issues message orders. TQC is responsible for authorizing all cancellations, substitutions, and amendments as necessary. Program intervention is not normally required in the scheduling process for most training. Programs remain responsible to approve/disapprove waivers of required or pre-arrival training in accordance with reference (b).

### **PROGRAM/COURSE MANAGER RESPONSIBILITIES**

Submit budget request documentation as required by the program single POC and CG-1323, in accordance with reference (c).

Review of annual course schedules should include, but not be limited to:

1. Reconcile the number of class convening and students per class to the approved total number of quotas in the MSP for the same course. If discrepancies exist, either request more quotas through CG-1323 by identifying quota offsets or available funds, or look to reduce class sizes or cancel convene dates.
2. Ensure convene date(s), duration, class size, course title, and course IDs, are correct. Convene dates need to be double checked to ensure training day listed is not a Sunday or holiday (unless that is actually when the class convenes.) Submit requests to add, delete, or change class dates or other information to CG-1322, and then, forward to CG-1323 using the 'A' and 'C' School Change Request Form (TQC Website Program Managers area).
3. Update class 'C' course descriptions and course pre-requisite information in writing to TQC as required.
4. Update "Send trng request to" column as necessary.

(**Note:** TQC maintains the course session information in CGHMRS, posts the schedules on their website at <http://www.uscg.mil/hq/tqc/>. This document is downloadable from the Website and is updated on a weekly basis.

As needed throughout the Fiscal Year, confirm training dates listed in 'A' and 'C' School schedule on TQC's website with Training Centers. Notify TQC of any discrepancies.

Gain approval from **CG-1323 for all course/session-scheduling changes**. Any change to session convening schedules must be approved through CG-1322 and they will forward it to CG-1323 for final approval, the training center POC (if applicable), and TQC using CG-1323 Change Request Form.

Arrange with all vendors for non-Coast Guard training. Reconcile program "seat" requests with number of authorized quotas. Ensure all discrepancies are addressed to CG-1323 and TQC.

Notify TQC of ALL commercial course session dates prior to the start of the Fiscal Year or as soon as the date is arranged. This will allow TQC to plan scheduling workloads as appropriate and minimize "emergencies." This will also engage TQC's internal tickler system that notifies us within eight weeks prior to a session convening date. This reminder system saves student cancellations due to short-notice orders.

Annually request quotas in the MSP and review levels for accuracy, maintain the requested average estimated tonnage value in the MSP based on prior year actual and upcoming year considerations, such as changes in location, course duration or accommodation availability.

Approve/deny, by message or letter, any waiver requests for required training from field units, including pipeline training as prescribed in the reference (b).



When TQC controls quotas and selects students for courses, provide guidance in writing for student selection criteria.

When tuition/student fees are required, draft and submit a PR to CG-1012, (12 weeks prior to training).

For the programs with courses in reference (b), review cutter Master Training Lists (MTL's) for accuracy. Ensure MTL-listed training is executable.

Facilitate, along with the Training Center and program Training Manager from (CG-1322), any requests for Coast Guard training from DOD or other Federal Agencies. This may involve a formal Memorandum of Understanding (MOU) between the program and the requesting agency, (for example G-OPR's MOU with the USAF to train 2 USAF members per class at SAR school). **Note:** It is important to ensure that the other federal agencies are not being provided training at the expense of Team Coast Guard members not being trained. Normally, the MOU will be on a "no cost" basis to the Coast Guard; e.g. we are just providing a seat in the class, and the other agency is paying for any travel or per diem costs associated with the training.

Answer unit training officer questions as required.

In the case of non-resident training, require graduation rosters of those attending training to be turned in and submitted to TQC for verification/documentation.

Coordinate rescheduling of a session with less than 50% enrollment eight weeks ahead of the convening date. The program must notify the training center POC (if applicable), CG-1323 and TQC as far as recommending rescheduling or canceling the session. If the session is rescheduled, then the program retains all quotas. (Note: The class must be rescheduled by 4 weeks prior to its session convening date. All exceptions must be approved via CG-1323). If the program decides to cancel the class at the 4-week point, then they retain half the quotas and CG-1323 receives the other half. All lost quotas due to unfilled seats will be returned to CG-1323.

Actively explore alternate delivery systems (including those that are non-travel or non-resident).

Validate existing training.

**ADDITIONAL RESPONSIBILITIES FOR SLATE COURSE PROGRAM MANAGERS**

In addition to the above, all Slate Course program managers are responsible for the following:

Submit DA access form to PSC to acquire Program Manager Access (CGTASMGR). This access is required for program managers to enroll students into Direct Access sessions and for database information retrieval. TQC will not process slates by any method other than Direct Access.

Receive Electronic Training Requests and Short-term Resident Training Requests (CG-5223) from units.

Screen training requests to ensure member is eligible for training. Track session dates—notify TQC if dates will not be used no later than eight weeks prior to class convening date.

Enroll students in Direct Access no later than eight weeks in advance of training date. **ALL SLATES WILL BE ENTERED WITHIN DIRECT ACCESS.** Re-solicit at eight weeks if less than 50% of the slate is completed. Re-evaluate between four to six weeks. If at four weeks the session is still below 50%, consider canceling the session. Continue enrolling students throughout the timeline so the TQC scheduler can continue to work orders. It is much easier to cancel a session's orders late in the process than to attempt to issue the orders late and have students meet logistics requirements on short notice.

Solicit training requests via message for courses when appropriate.

Hold units/members accountable for non-compliance with program and TQC directives. Coordinate response with TQC in "no show" situations in order to hold units/members accountable.

Notify TQC via message or E-mail when member cannot attend training. Provide and authorize all substitutions. Last minute substitutions and cancellations should be disapproved, except for actual emergencies or operational commitments, in accordance with TQC message orders.

Prepare/submit contractor Statement of Work and any necessary MOUs to CG-1012.

**Students utilizing their Government travel cards may not pay tuition costs.** Students may pay for registration fees with the Government travel card, providing the slate ordering them to the course includes the following: "Members authorized to charge registration fee in the amount of \$00.00 on Government travel card and claim reimbursable expense on travel voucher".

Annotate attendees receiving “No Cost” orders, and for personnel receiving cost orders whether POC or Rental vehicles (practice is 1 rental vehicle per four students) are authorized and any other pertinent information. Indicate specific attendee(s) who are authorized rental vehicles. The following are rental vehicle guidelines:

<u>Nbr Students</u>	<u>Vehicle Type</u>
1 – 2	Compact
3 – 4	Mid-Size
5 +	Full or Van

The orders must specify the type of rental vehicles authorized.

For sessions that do not appear on the ‘A’ and ‘C’ School schedule, ensure form TAS-002 is filled out completely (enclosure 3). NOTE: **Only one session per each TAS-002.** If there are multiple convening’s, different classes, or different locations, each should be submitted separately on its own TAS-002.

Ensure proper side routers are included for units receiving message traffic (e.g., HQ, Area, MLC and Districts).

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## **VII. COMMUNICATION WITH TQC**

### **PURPOSE**

This chapter explains how to communicate with TQC schedulers regarding class 'C' school training.

### **DISCUSSION**

TQC's website provides TQC's address for written inquiries as well as a list of extensions, e-mail addresses and scheduling responsibilities. E-mail questions are preferred over phone requests especially during pre-arrival training season. Remember, TQC schedulers are not curriculum writers or subject matter specialists. They can and do provide information regarding quotas, scheduling and TDY entitlements.

### **PHONE**

A list of schedulers and their scheduling responsibilities can be found at the TQC website: <http://www.uscg.mil/hq/tqc/tqcpo.htm>. E-mail should be the primary means of communication between programs and TQC schedulers. This provides TQC schedulers with a written record of your communication and allows TQC to respond faster to your inquiries.

### **WEB**

TQC's schedulers will also post course/team information on our Internet site. Our web site address is <http://www.uscg.mil/hq/tqc/>

## **VIII. FREQUENTLY ASKED QUESTIONS**

### **PURPOSE**

This chapter attempts to clarify some of the more common questions that TQC receives from program and course managers

### **QUERY INFORMATION**

- **Can TQC provide individual student information for my courses?**

Yes; TQC maintains the TAS database (a module of Direct Access) on Coast Guard Class 'C' school compilations. Information is released in accordance with the Privacy Act of 1974. When requesting information on individual students, the following should be included: Rank/rate, Student name, Employee ID (EMPLID), Course ID and convene date if known. Program and course managers also have access to this information via Direct Access.

- **Can TQC provide query information, listing trained personnel for my courses?**

Yes; You must make your request in writing, via e-mail, message or fax. Include the course ID, the period for which you want the query run, and what it is to be used for. All queries come with the following caveat: "The compiled list of all students trained throughout the duration of the period may be used as a job aid, but should not be considered accurate enough to solely base program decisions, statistics, or strategic decisions. It should not be considered 100% complete or accurate due to lack of complete roster input" - some of the students listed may have been "no shows" to the training session. If TQC did not receive a graduation roster, there was no after action reconciliation.

### **TDY ORDERS AND SLATE INFORMATION**

- **How far in advance does TQC issue orders to class 'C' training?**

TQC's ideal window for issuing orders to class 'C' school is 6-8 weeks in advance of the class. This facilitates unit planning for PERSTEMP issues. Also, if a unit needs to cancel a quota, this gives TQC, or the program time to identify a substitution.

- **If I am a SLATE program/course manager, when do you want the slate entered in Direct Access?**

In order to process our orders 6 weeks prior to the class convene, TQC needs your slate input in Direct Access 8 weeks prior to the class convene date. If at the 8 week point your slate is at less than 50% full, take action to solicit, reschedule or consider

cancellation. Normally, TQC will recommend to CG-1323 and the program to cancel the course if less than half full at the 4 weeks prior to the class convene date.

- **Can I request TONO & accounting information via the phone or e- mail?**

No. TONO & accounting information is generated automatically when orders are created in DIRECT ACCESS. This information may be provided over the phone, but only after orders are issued in DIRECT ACCESS.

## **ELECTRONIC TRAINING REQUEST (ETR)**

- **What is the Electronic Training Request?**

The Electronic Training Request gives Training Officers the ability to submit and track status of a training request electronically through Direct Access. Information on the ETR can be found at <http://www.uscg.mil/hq/tqc/etr directions1.ppt>. TQC highly recommends program managers require students to use this form of request.

## **HUMAN PERFORMANCE TECHNOLOGY (CG-1322)**

- **What is HPT?**

HPT is a systematic approach to improving human productivity, competence and capability. The goal of HPT is to identify and develop a set of interventions (or solutions) that solve or mitigate barriers to performance (i.e., lack of skill or knowledge, a flawed environment, ineffective reward or incentive systems, poor motivational structures, wrong people assigned to jobs, new or unique equipment or systems).

## **TRAINING REQUIREMENTS (CG-1322)**

- **What is a performance requirement?**

A performance requirement is a task that an individual, team, or unit must perform to support an activity linked to mission goals/objectives; the task & therefore the activity further support Coast Guard strategy in performance of Department/National strategy. This linkage is often found in capstone and supporting doctrinal & policy documents.

Tasks are:

- Measurable to a defined standard
- Described in terms of the environment and conditions under which they are performed
- Linked to a particular job, team, or type of unit, or mission set
- Aligned with CG & other agency/service policies
- Consistent with Coast Guard legal authorities and jurisdiction

In short: requirements are a description of what needs to be done (under defined conditions), who is doing it, how they are going to do it, why they are doing it, and finally and importantly how will you know that they are successful.

- **Who is responsible for identifying and defining performance requirements?**

Programs (Managers) who own the performance provide the requirements as part of the planning process to field a capability in response to mission requirements.

- **When does the Training System provide training for a task?**

A task, as identified above, will fall into one of several categories:

- New tasks that the personnel, team, or unit are not deemed to be capable of performing due to a lack of skills and knowledge
- Existing tasks that personnel, team, or unit is deficient in performing due to lack of skills and knowledge. This requires causal analysis of the gap between optimal and actual performance.

- **Why aren't all tasks trained?**

Training is only effective at solving skills and knowledge deficiencies in the workforce. Often, workforce skill is transferable from one task to another. In many cases other alternatives will empower the desired performance- guidance, feedback, tools, workplace environment, among.

## **SERVICE REQUIREMENTS**

- **What are the service requirements for sending a member to Class 'C' training?**

In accordance with the Training and Education Manual COMDTINST M1500.10 (series), a unit may not authorize TDY travel for a member to Class 'C' training if they do not have at least one year of service remaining on their current enlistment or period of active service for advanced training greater than two weeks and less than 20 weeks duration at the completion date of class. TQC will issue the orders and expect commands to either extend or re-enlist the member or request a cancellation of orders.

For Class 'C' training less than two weeks duration, there is no obligated service requirement. It is left to each unit Commanding Officer's discretion.

## QUOTAS

- **How can I find the status of quotas in a particular class/course wait list?**

Examine the specific session or the session wait list in TAS. Or, you can contact the appropriate scheduler at TQC for information.

## RESERVES

- **Why are orders issued for Reserves members with no accounting/TONO information?**

Because of Congressional limitations on how much AFC-90 can be transferred to repay AFC-56, Reserve training is now more directly funded from AFC-90. Reserve TDY entitlements, and Pay and Allowances are now handled through the servicing PERSRU with AFC-90 funds.

## ENTITLEMENTS

- **How do I find information regarding TDY entitlements for military personnel?**

The Joint Federal Travel Regulations JFTR, Chapter 3, specifically U3300, and Chapter 4 in its entirety provide information regarding TDY entitlements for military members. Current per diem rates, along with the JFTR and other useful travel information can be found on the web at; <http://www.dtic.mil/perdiem/>. The Personnel and Pay Procedures Manual, PSCINST M1000.2A, Chapter 3, section B has useful information regarding TDY travel orders.

- **How do I find information regarding TDY entitlements for DOT civilians?**

Information regarding DHS civilian travel entitlements can be found at the PSC website.

- **What is the policy for rental vehicles?**

If the program manager has included in budget formula and is deemed necessary IAW JFTR. No more than 1 rental vehicle per four students will be authorized in the travel orders. The exception is students who are on the economy, using commercial berthing and messing. In this case a rental car is issued to each student.



**QUOTA OFFSETS**

- **What is the process for issuing Permanent Change of Station/Temporary Duty (PCS/TEM DU) orders?**

PCS/TEM DU should be coordinated with the appropriate assignment officer (AO) at CGPC and the member. TQC is NOT authorized to issue PCS/TEM DU orders. TQC does issue TDY orders, (including travel to/from current PDS to training center and associated per diem). If the member is planning on departing his/her PDS and conducting training en route to new PDS, then they need approval from the programs and appropriate AO.

- **What is a quota offset?**

A quota offset is an adjustment to the # of quotas as listed in the class ‘C’ school Master Training Spend Plan (MSP) to satisfy a need for your course(s). Remember the quota pot is finite. For example, as a program you may have two courses with a total of 120 quotas authorized by the MSP. The quotas are distributed between your courses as follows: Course **X** - 100 quotas; Course **Y** - 20 quotas. If you or your TQC scheduler has determined that there is a need for 25 quotas vice 20 for course **Y**. It is decided that the 5 additional quotas can come from course **X** by “offsetting” or “reprogramming” them. (So, after offsetting, the final quota count for the FY would be 95 for course **X** and 25 for course **Y**). A one-for-one quota swap like the above example can only happen if the courses have equal or nearly equal average cost per quota values.

- **Where do the quotas come from to do offsets?**

As seen in the example above, quotas can be offset from a course you already manage. Quotas can also be offset from within your Directorate. If there is no room for offsetting quotas in your course(s) or Directorate, then you can forward an offset request in to CG-1323, via your program’s single POC. Offsets will be provided on a priority basis if funding is available. In most cases, your request will have to compete with other program needs at the quarterly class ‘C’ prioritization meeting.

- **How do I complete a quota offset?**

Complete a [Class A & C School Change Request Form](#) (TQC Website Program Managers Area) forward to CG-1322, and they will forward it to CG-1323 for final approval. The form must be signed by the Program Director or Program single POC.